Student Assistance Programs (Financial Aid)	**Agency/Program #:** 5102-02-I1
	Division:
	Program: Student Assistance

Agency Name:	Montana University System/Office of the Commissioner of Higher Education	
Agency Contact:	Tyler Trevor, Associate Commissioner of Higher Education	444-0307
LFC Contact:	Senator Dave Wanzenried	
LFD Liaison:	Alan Peura, Fiscal Analyst II	444-5387
OBPP Liaison:	Suzan Scott, Budget Analyst	444-4895

Program or Project Description:

Complete a comprehensive report analyzing the federal and state components of student financial aid that should include findings/recommendations for how to best achieve the goal of affordability.

Appropriation, Expenditure and Source

Fund Name:	2008		2009		Approp & Expenditure numbers are as of October 31, 2007
	Approp.	Expended	Approp.	Expended	
General Fund	1,530,000	751,793	2,510,000		
State Special					
Federal Funds					
Total:	**$1,530,000**	**$751,793**	**$2,510,000**	**$0**	

Goal(s):

Increase the overall educational attainment of Montanans through increased participation, retention, and completion rates in the Montana University System (MUS) by: Making higher education more affordable by offering more need-based financial aid grants, and scholarships. Promoting postsecondary education affordability.

Performance Measures :

A report analyzing federal and state components of financial aid (e.g. Baker, MHEG, Pell, LEAP, SLEAP, Gov's Scholarships, MPACT, tuition waivers, MUS Honors, work study, Perkins, etc.) to include findings/recommendations for how to best achieve affordability goal.
Increase the percentage of need-based students receiving financial aid awards.
Increase the average total need-based aid award amount.
Proposed new measures (under consideration by the interim PEPB subcommittee): Build a student financial aid central data warehouse. Increase state funded need based aid per FTE student.
Reduce the amount of unmet student need for financial aid.

		Completion Dates	
2009 Biennium Significant Milestones:		**Target**	**Actual**
1	Additional measures of need-based aid developed (see PEPB, Shared Policy Goals)	Dec 2008	
2	Financial aid data warehouse developed	March 2008	
3	Comprehensive report on financial aid produced	June 2008	
4	Measures of unmet need calculated	June 2008	
5			

Performance Measurement Report

Performance Report:

Significant progress has been made on the development of the financial aid data warehouse. Representatives from financial aid offices throughout the MUS have agreed on the structure and content. Programming at the system office has begun. Measures of unmet need will be presented to PEPB for adoption as new shared policy goals.

LFD Narrative:

Executive Changes:
  1. No changes to Goals/Initiatives
  2. No changes to Peformance Measures

LFD Assessment:
  1. Yes, goals are measurable within the bienium
  2. Progress toward goal: On-track - The Postsecondary Education Policy and Budget subcommittee (PEPB) has made the request for a comprehensive report from the Office of the Commissioner of Higher Education (OCHE), scheduled in June 2008, that will address need-based and merit-based student assistance programs across the university system in order to help identify gaps or other issues. In the meantime, the PEPB will be working with OCHE to continue to refine the specific data measures as the data warehouse and data gathering capacity increases. It is anticipated that PEPB will once again devise and sign a Shared Policy Goals and Accountability Measures agreement for the 2009 biennium with the Board of Regents, of which the student assistance and finanical aid programs will continue to be addressed as a major component.

Appropriation Comments:
  1. Yes, appropriation/expenditures provided
  2. No appropriation issues

Options regarding goal/initiative and performance measures:
 1. On track - remove from discussion in June 2008 and consider request for update report in November 2008

Legislative
Fiscal Division

LFD

Version	Date	Author	Change Description
EO -1	11/1/07	Peura	Initial completion of form (updated LFD Narrative 12/04/2007).